



Opportunities Assessment – Discover Ways to Maximize Your Fundraising Ecosystem

Presented By: Kyle Gregory, Give Back Nation
Wednesday, June 23, 2021 | 2:00 – 3:00 p.m.



A little housekeeping...



We're recording this webinar!

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



Feel free to ask questions!

Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



We will be live-tweeting!

Share your highlights and takeaways with the **#qgivwebinar** hashtag, and please make sure to follow **@Qgiv**!



We know the value of relationships and are proud to connect you with Give Back Nation, a member of our partner network.

Powerful Fundraising Technology + Increasing Efficiency, Fundraising and Impact



Raise More, Manage Less

**Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions
Integrations & Data**



YOUR GIVING & FUNDRAISING HUB

**Tools | Knowledge | Coaching
Strategy | Implementation**

Today's Speaker



Kyle Gregory | CEO & Co-Founder of Give Back Nation

From 2006, using his vast array of management experience and dedication to “giving back”, Kyle, his father, Nick, and several other entrepreneurial philanthropists spent more than five years in planning the launch of Give Back Nation, a resource dedicated to expanding impact.

From the national HQ in Orlando, Kyle oversees the research, vetting and selection of expert sourcing partners, solutions and platforms, coaching best practices and strategic planning to better serve and help maximize the fundraising ecosystem.



a national 501(c)(3) nonprofit serving other nonprofits with vetted tools, knowledge, coaching, strategy and implementation to increase efficiency, fundraising and impact to help maximize the fundraising ecosystem

A banner image showing a beach scene with waves crashing against rocks. The text is overlaid on the image.

Creating Bigger Waves of Impact

Tools - Knowledge - Coaching - Strategy - Implementation



IMPACT

In 2020, our Give Back Nation Team, Affiliates and Business Partners served, supported and helped to *give back* over \$302 million to over 540 nonprofits across the country.

GIVE BACK NATION™

YOUR GIVING & FUNDRAISING HUB

A FEW ORGANIZATIONS AND INITIATIVES WE SERVE AND SUPPORT



Opportunities Assessment – Discover Ways to Maximize Your Fundraising Ecosystem

the fundraising ecosystem: everything needed, working in harmony, to efficiently and effectively raise funds to thrive, not just survive

(branding, storytelling, tools, engagement, strategy, events, staffing, board alignment, data management, planned giving, donor cultivation, etc.)

Where To Begin? How Much Time Needed? What Opportunities Available?

Focused on running the organization. Overwhelming!

Areas of the Fundraising Ecosystem

Online Giving Mobile Giving Text Giving Text Marketing

Giving Kiosks Recurring Donations Event Registration Event Management

Event Production Event Strategy Social Fundraising Peer-To-Peer Fundraising

Crowdfunding Social Sharing Social Media Marketing Web Marketing

Marketing Strategy Web Design Organizational Analysis Printing & Direct Mail

Board Engagement Organizational Alignment Planned Giving Implementation

Grant Writing & Research 501(c)(3) Setup Strategic Planning Donor Management

Donor Cultivation Accounting Software Ongoing Coaching & Support Workplace Giving

Wealth Screening Online & Onsite Auctions Awareness & Store Fundraising Products

Employer Matching Gifts SEO Year-End & Capital Campaigns

3 Main Pillars of the Fundraising Ecosystem

1. Branding and Storytelling
2. Removing Barriers to Give
3. Data Management + Engagement

3 Main Pillars of the Fundraising Ecosystem

- 1. Branding and Storytelling**
2. Removing Barriers to Give
3. Data Management + Engagement

Quick Assessment #1:

Are you proud of your website?

- A. Yes
- B. No
- C. Certain areas of it



First Pillar – Branding & Storytelling

Everything counts.

Name + Logo + Website

Create a positive
first impression.

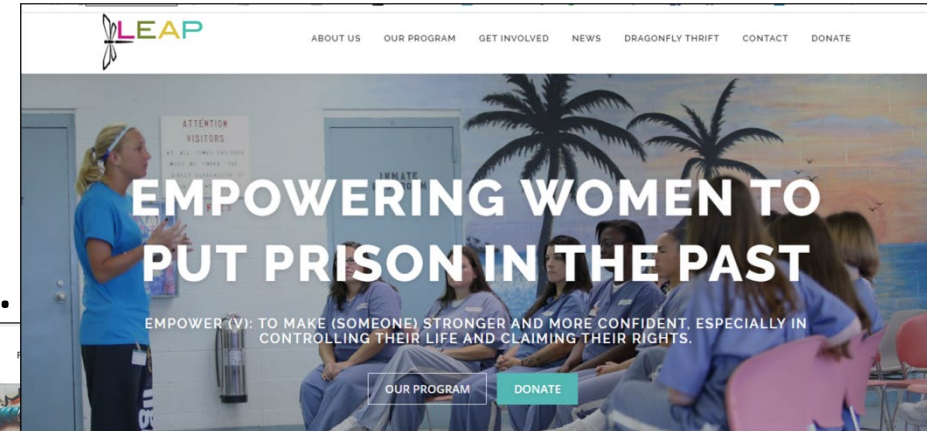
15-30 seconds.

Build respect.

Fresh. 21st Century.



BuildingAStrongerFamily.org



LeapForLadies.org

HeelsToHeal.org

First Pillar – Branding & Storytelling *continued...*

Everything counts.

Solutions



Stay in control.

First Pillar – Branding & Storytelling

Everything counts.

Who, What, Why & How

The screenshot displays a website interface with a background image of a person's face. It features three main content pillars arranged horizontally:

- Who We Are:** Represented by an icon of three people. The text describes a non-profit organization dedicated to helping individuals overcome negative impacts on their well-being, happiness, and success.
- Why We Do What We Do:** Represented by a heart icon. This pillar is highlighted with an orange background. The text states that statistics show both families and individuals from youth to adult are suffering in all areas, including suicide, mental and physical abuse, self-esteem, and depression.
- What We Do:** Represented by an icon of two hands shaking. The text describes providing detailed and in-depth workshops and programs designed to overcome obstacles and roadblocks that hinder individuals and families from living a full, happy, and purpose-filled life.

Below these pillars is a section titled "Events And Workshops" with three small thumbnail images showing people.

**Who we are.
What we do.
Why we do it.
How we do it.**

First Pillar – Branding & Storytelling *continued...*

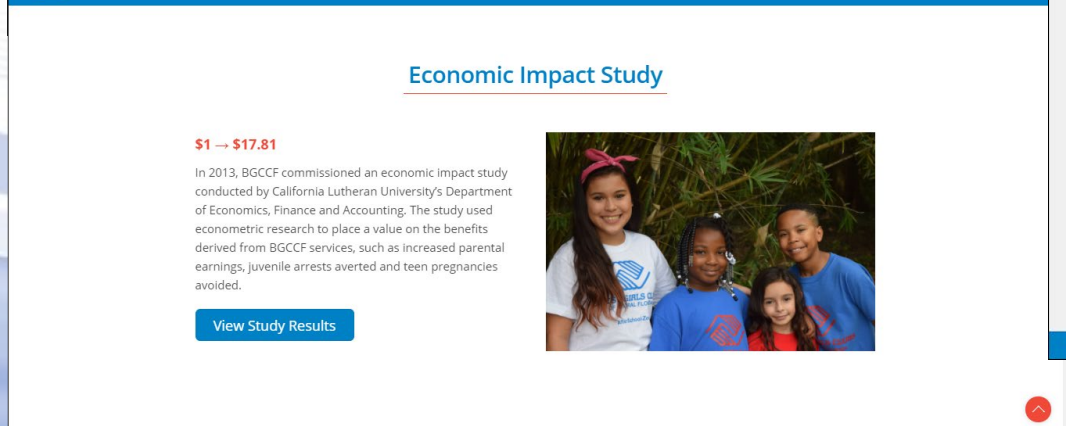
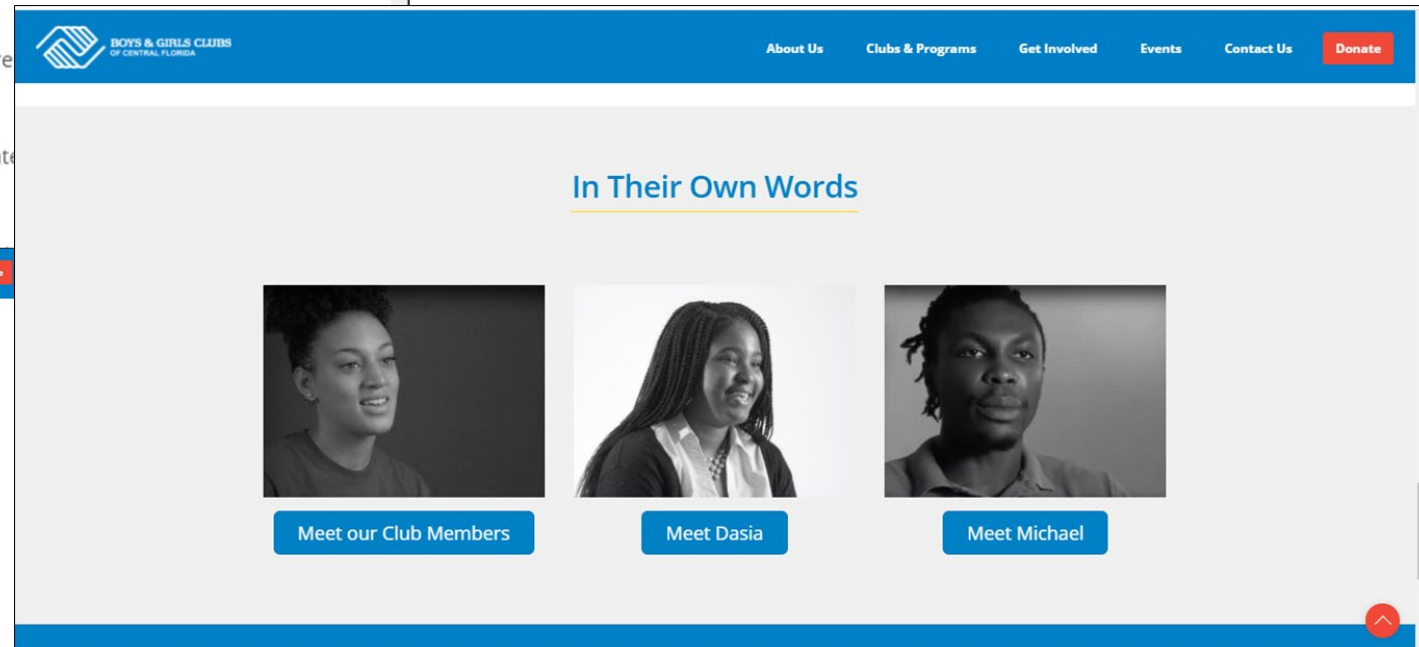
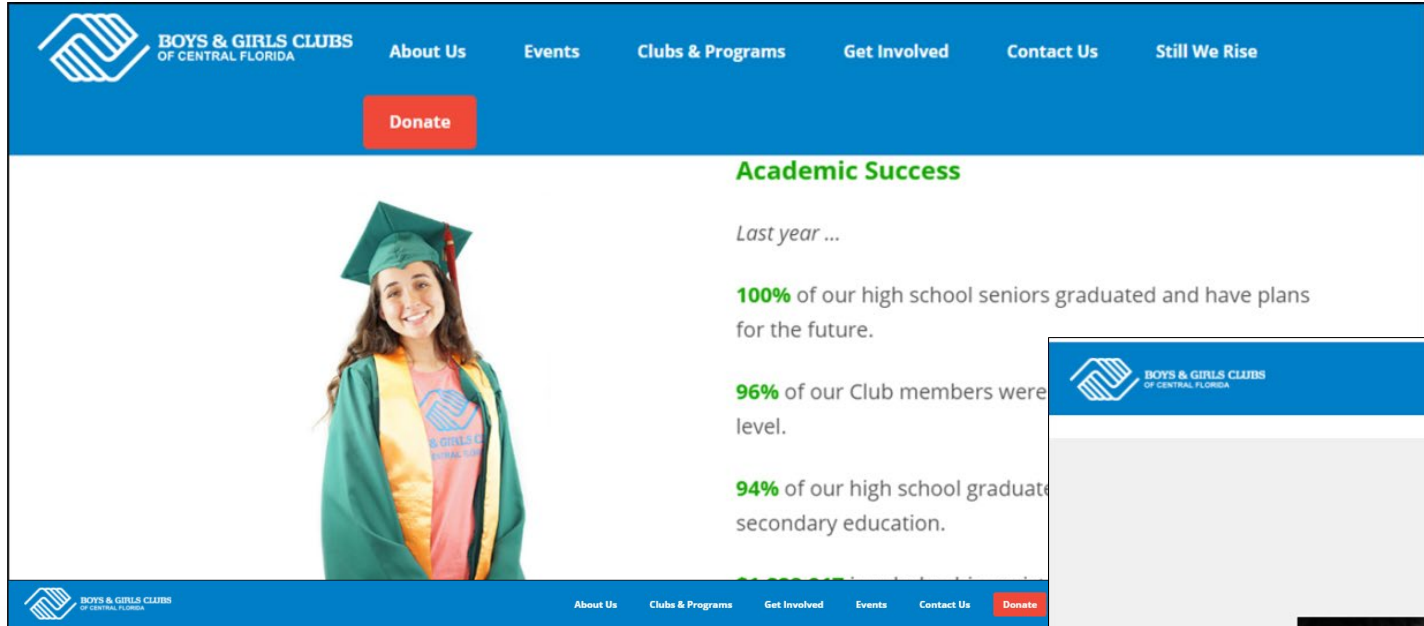
Everything counts.

Impact Storytelling – Showcasing Impact

Mission, impact and measurable successes.

Easily found and professionally showcased.

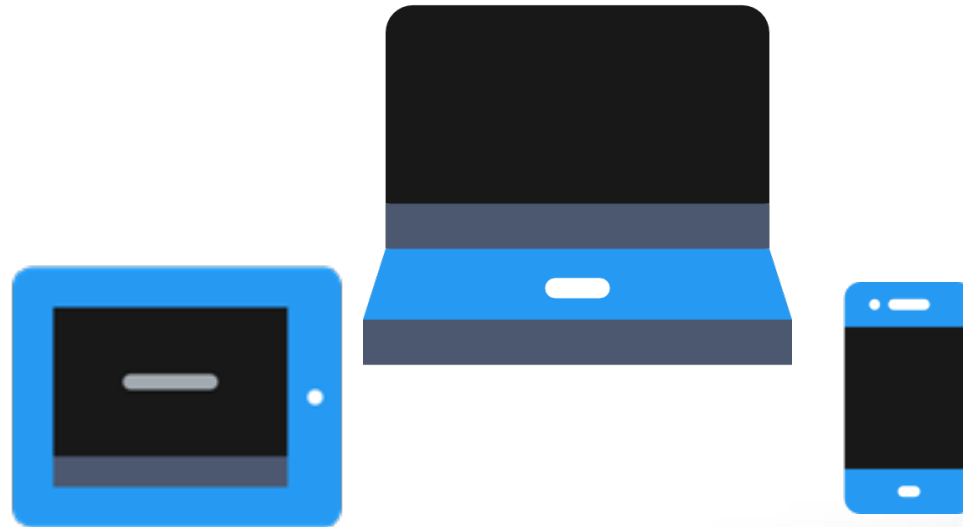
Stats and numbers.



First Pillar – Branding & Storytelling *continued...*

Everything counts.

Website Responsiveness



**Over 55% of website visitors
are on mobile devices...**

**What does your website look
like on mobile?**

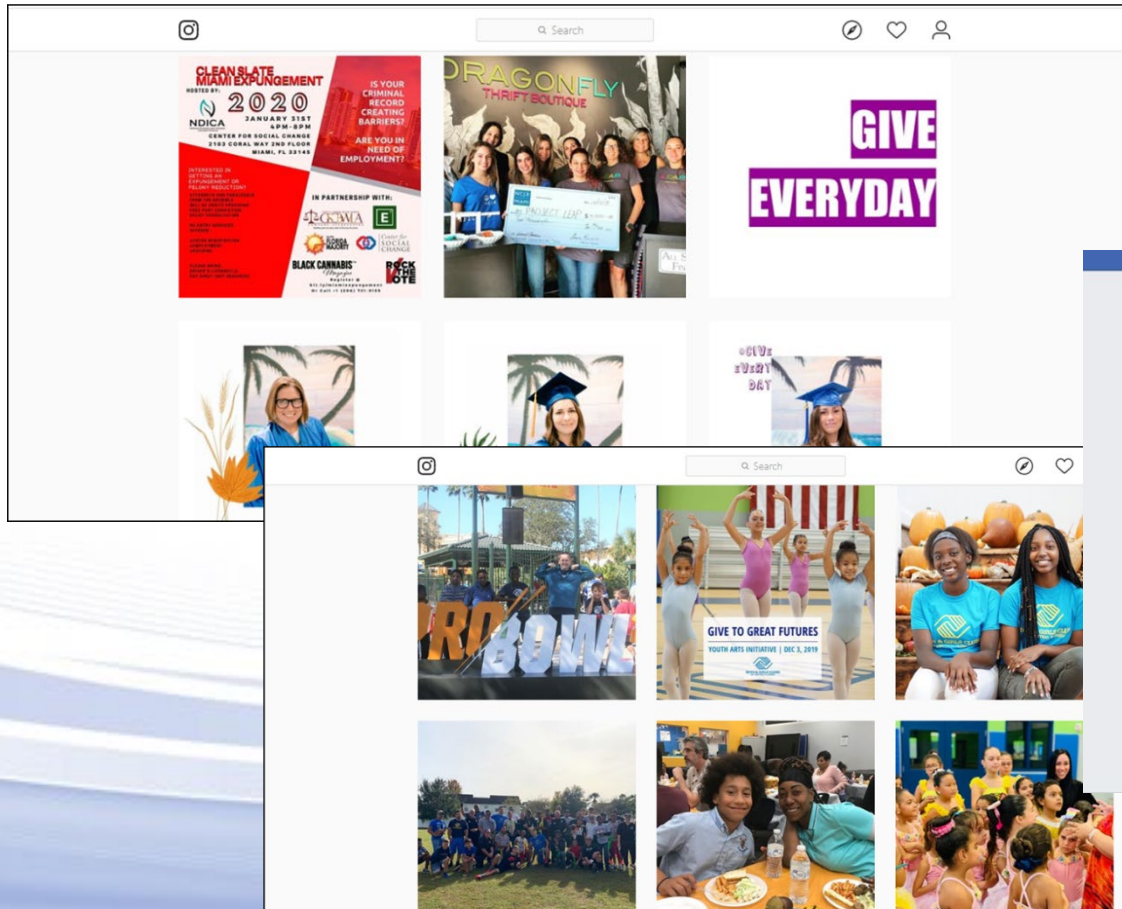
First Pillar – Branding & Storytelling *continued...*

Everything counts.

Social Brand & Storytelling

Branding should be consistent.

Share impact. Share stories.



First Pillar – Branding & Storytelling *continued...*

Everything counts.

Get feedback.

Learn about what's working and leverage it.

Ask your **Ambassadors** (best relationships):

- Why did you get involved?
- What helped you get passionate about our cause?
- Does our website/collateral/outreach tell our story?



Takeaways

1. Everything counts, respect earned or lost
2. Name, tagline and Logo begins the story
3. Fresh, contemporary website
4. Stay in control and ‘own’ your website
5. **Who** We Are, **What** We Do, **Why** We Do What We Do, **How** We Do It
6. Stats and numbers help showcase impact
7. Consistent branding across web, social and collateral
8. Mobile responsive
9. Ask questions/get feedback from supporters

3 Main Pillars of the Fundraising Ecosystem

1. Branding and Storytelling
- 2. Removing Barriers to Give**
3. Data Management + Engagement

Quick Assessment #2:

Can supporters donate on your website (*embedded*) OR are they taken away to a new window hosted by a third party processor?

- A. On website
- B. Away to new window

Second Pillar – Removing Barriers To Give

Empower supporters to give anytime, anywhere.

The Rise of Online/Social Fundraising

Age: 24-40

41-55

56-76

Cash and checks
are great,
but...

MILLENNIAL DONORS WORLDWIDE	GEN X DONORS WORLDWIDE	BABY BOOMER DONORS WORLDWIDE
PREFER TO GIVE <ul style="list-style-type: none"> Online (credit/debit card) 55% Cash 14% Bank/Wire Transfer 11% PayPal 9% 	PREFER TO GIVE <ul style="list-style-type: none"> Online (credit/debit card) 55% Bank/Wire Transfer 12% Cash 10% PayPal 10% 	PREFER TO GIVE <ul style="list-style-type: none"> Online (credit/debit card) 54% Direct Mail/Post 19% Bank/Wire Transfer 10% PayPal 8%
MOST INSPIRED TO GIVE BY <ul style="list-style-type: none"> Social Media 39% Email 23% Website 20% Direct Mail/Post 6% 	MOST INSPIRED TO GIVE BY <ul style="list-style-type: none"> Social Media 33% Email 26% Website 19% Direct Mail/Post 9% 	MOST INSPIRED TO GIVE BY <ul style="list-style-type: none"> Email 33% Social Media 19% Direct Mail/Post 18% Website 16%

[Source: 2018 Global Trends in Giving Report]

Second Pillar – Removing Barriers To Give

Empower supporters to give anytime, anywhere.

Key Giving Trends in the 2020 Blackbaud Institute's Charitable Giving Report:

- US **charitable giving** grew 2% year-over-year
- **Online giving** grew by nearly 21%, representing more than a 32% increase over the last three years
- A record **13% of fundraising** came from online donations in 2020
- Nearly 30% of all online gifts were made from a **mobile device**
- Though nonprofits of all sizes experienced a significant drop in charitable giving in April, May and June, giving made a remarkable recovery in the **second half** of 2020

Second Pillar – Removing Barriers To Give *continued...*

Empower supporters to give anytime, anywhere.

If someone is in the mood to give, make it easy.

Second Pillar – Removing Barriers To Give *continued...*

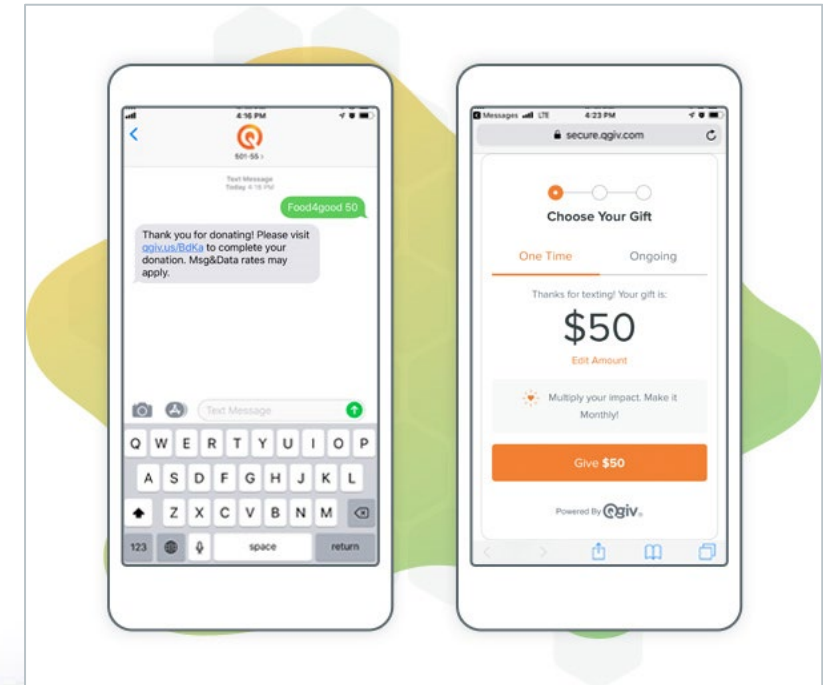
Empower supporters to give anytime, anywhere.

Tools

GivingPortal

TheHopePartnership.org

Text Giving



80%

Don't Finalize

- Embedded forms increase branding and minimize unwanted questions.
- Don't send people away.
- Multi-step forms increase success.
- Recurring giving options allow you to plan.

- Anytime. Anywhere.
- Text (keyword) to 501-55 to donate any amount.
- Text-to-Donate vs Text Giving

Second Pillar – Removing Barriers To Give *continued...*

Empower supporters to give anytime, anywhere.

Tools

Peer-To-Peer



Empower your supporters.

Help them help you.

Expand your reach.



Second Pillar – Removing Barriers To Give *continued...*

Empower supporters to give anytime, anywhere.

Tools

Social Sharing Built-In

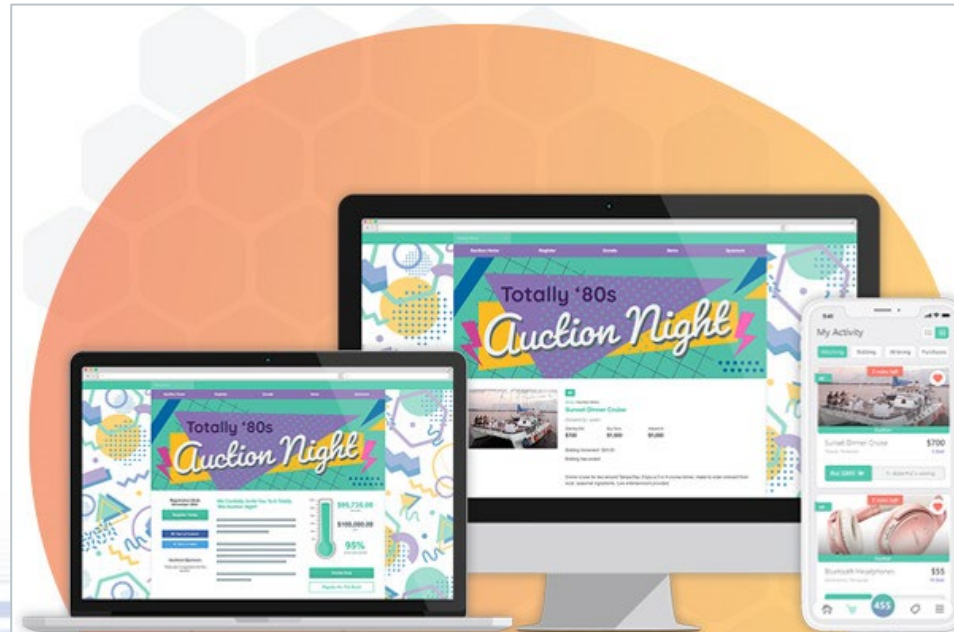


Customizable Forms

*Layouts, Colors,
Options, Receipts, Etc.*

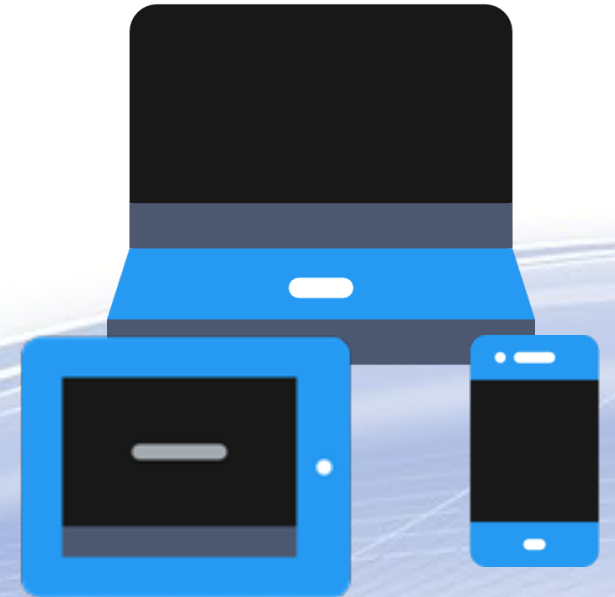


Online + In Person Auctions



Unlimited Participants + Auto Outbid Notifications =
Increased Data Gathering & Fundraising

Form Responsiveness *Over 55%...*



Second Pillar – Removing Barriers To Give *continued...*

Empower supporters to give anytime, anywhere.

Tools

Employer Matching Gifts

- Estimated \$4 -7 Billion goes unclaimed annually.
- Potential to increase annual donations by 10-20%.
- Embed right into your donation portal to seamlessly remind donors.
- 1 in 3 donors indicate they would give a larger gift if matched. (2021 Matching Gift Statistics from Double Your Donation)
- Screen past donations for opportunities FREE.
- Automated process. Saving you time.

Matching Gifts

Your gift could be worth more with a matching gift from your employer!

Employer

Apple



Apple is likely to donate an additional **\$50.00** thanks to you!

Powered by



Hi Shay Lessman,

We wanted to follow-up because your company offers a matching gift program. This program can make your recent donation help our organization even further! At the bottom of this email is the information that we have about your company's employee matching gift program.

If you're able to submit your match, please click the link below to let us know:

[Click here when you completed your Matching Gift Paperwork](#)

Second Pillar – Removing Barriers To Give *continued...*

Empower supporters to give anytime, anywhere.

Giving Statistics from NonprofitsSource.com

Online Giving Continues To Grow

- Embedded donation pages raise 6x more
- Pre-selecting monthly giving increases up to 35%
- Millennials more likely to give monthly vs large one-time

Peer-To-Peer Fundraising

- Average of 8 people donate to individuals page
- Thermometers help increase giving by 35%

Online Giving for Churches

- 49% of church giving transactions by card
- Churches that accept online increase by 32%

Social Media

- 55% of people who engage with nonprofits on Social Media end up taking some sort of action
- 59% of those people donate money
- During average peer-to-peer campaign, 15-18% of donations are referred directly from Facebook

Second Pillar – Removing Barriers To Give

Takeaways

1. All generations prefer to give online
2. Online giving grew 21% in 2020
3. Embed and leverage multi-step to maximize completion (80%)
4. Anytime anywhere with Text
5. Empower supporters with Peer-to-Peer
6. Social sharing and customizable tools
7. Virtual auctions increase data gathering and fundraising
8. Must be mobile responsive
9. Don't miss out on matching gifts

3 Main Pillars of the Fundraising Ecosystem

1. Branding and Storytelling
2. Removing Barriers to Give
- 3. Data Management + Engagement**

Quick Assessment #3:

To manage supporter data, are you currently leveraging spreadsheets (*Excel or similar*) or a true CRM (*customer relationship management*)?

- A. Spreadsheets
- B. CRM

Third Pillar – Donor & Data Management + Engagement

Data fuels engagement for long-term sustainability

After someone gives, where does that data/information go? How is it leveraged?

What tools are being used to engage donors and supporters?

Quality engagement, fueled by good data, becomes the lifeblood of an organization.

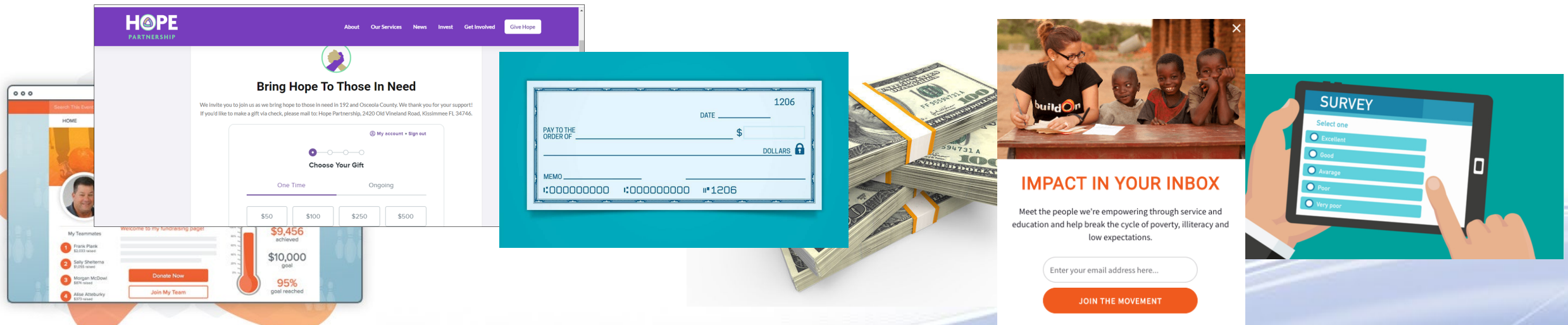


Third Pillar – Donor & Data Management + Engagement *continued...*

Data fuels engagement for long-term sustainability

Collection

Have a data gathering plan.
Donations, Surveys, Events, Website, Etc.

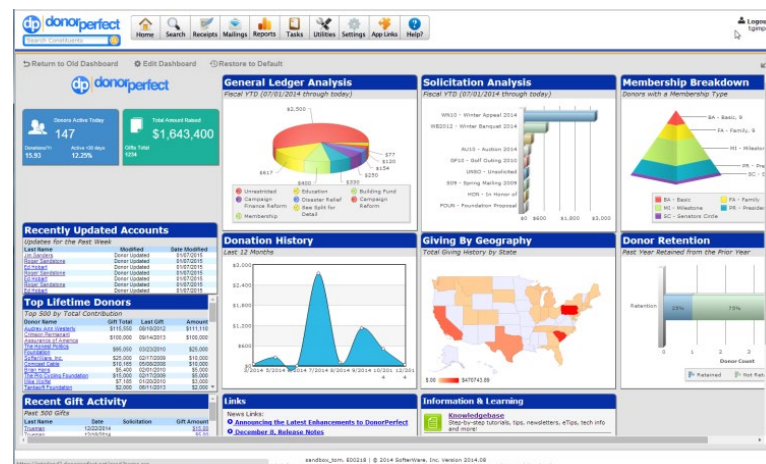
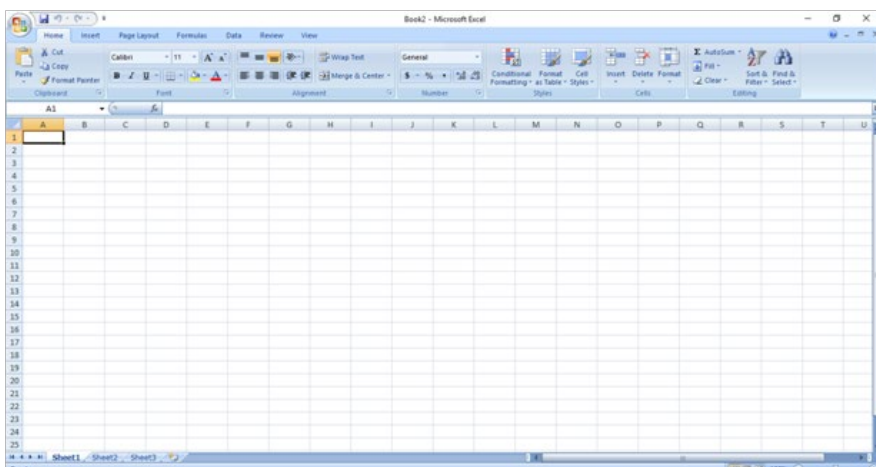


Also, have a data input plan.

Third Pillar – Donor & Data Management + Engagement *continued...*

Data fuels engagement for long-term sustainability

Donor Management Tools (customer relationship management)



 **bloomerang**

 **salesforce**

 **donorperfect**
online fundraising software

- Simple, limited lists.
- Difficult to share and access.
- Difficult to organize all data points.

- Secure, organized and cleaner data.
- Integrations migrate data seamlessly.
- Accessible anywhere, anytime by all staff.
- Schedule tasks, follow-ups and reminders.
- Spot trends, analyze, thank & communicate efficiently.

Third Pillar – Donor & Data Management + Engagement *continued...* *Data fuels engagement for long-term sustainability*

Wealth Screening – Analyze Your Data To Uncover Capacity



- **Leverage billions of wealth, philanthropic and biographic data points so you know your donors better.**
- **Find new donors by seeing who supports similar causes and may have an inclination to give to you.**
- **Zero-in on donors with the greatest capacity.**

Third Pillar – Donor & Data Management + Engagement *continued...*

Data fuels engagement for long-term sustainability

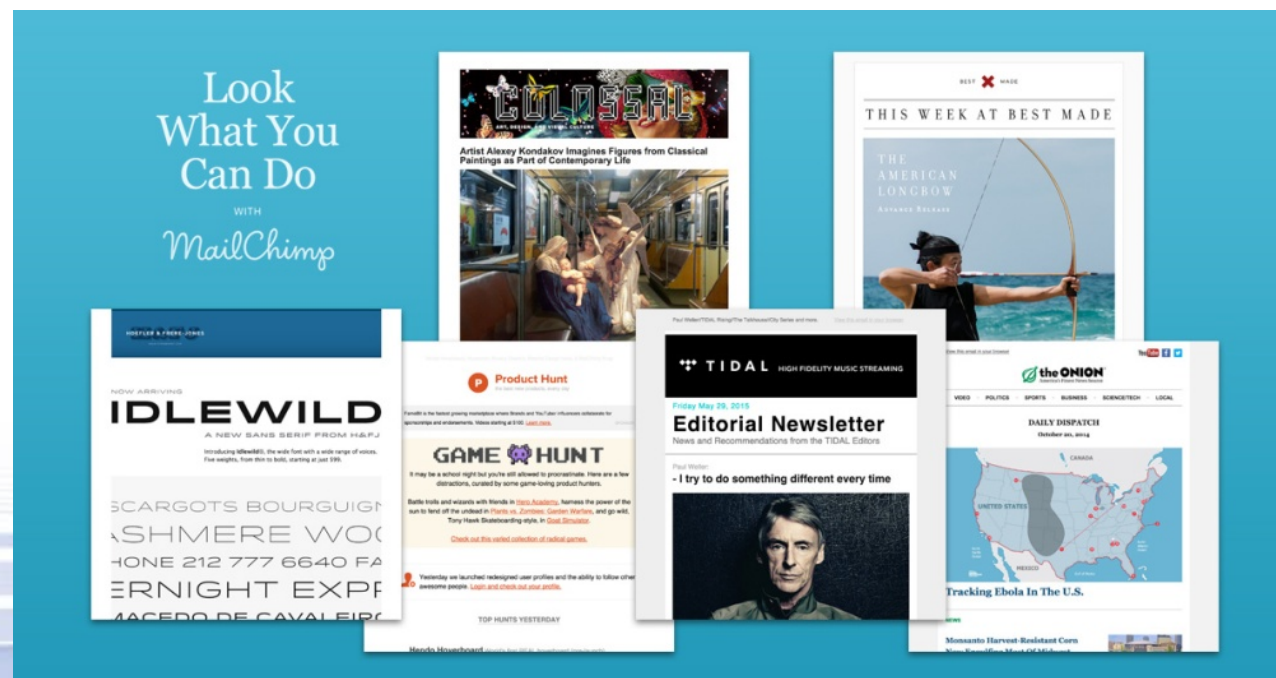
Email Engagement Tools

MailChimp

Constant Contact

 **KLAVIYO**

- Can take 10-20 touch points before action.
- Monthly, quality, impact storytelling email engagement.
- Key for recurring donors.



Third Pillar – Donor & Data Management + Engagement *continued...*

Data fuels engagement for long-term sustainability



Communicate: Text Engagement Tools

98% Open Rates

SimpleTexting



- Compared to 20% email open rates and other engagement tools, powerful to know your news, updates and impact stories actually reach your supporters and contacts.

- Opt-in is key.

Third Pillar – Donor & Data Management + Engagement

Takeaways

1. Data gathering plan
2. Data input plan
3. Manage data efficiently to leverage data effectively (CRM)
4. Wealth screen your data to uncover capacity
5. Quality, routine engagement for long-term success

Fine-tuning your Fundraising Ecosystem

Online Giving Mobile Giving Text Giving Text Marketing

Giving Kiosks Recurring Donations Event Registration Event Management

Event Production Event Strategy Social Fundraising Peer-To-Peer Fundraising

Crowdfunding Social Sharing Social Media Marketing Web Marketing

Marketing Strategy Web Design Organizational Analysis Printing & Direct Mail

Board Engagement Organizational Alignment Planned Giving Implementation

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Donor Cultivation Accounting Software Ongoing Coaching & Support Workplace Giving

Wealth Screening Online & Onsite Auctions Awareness & Store Fundraising Products

Employer Matching Gifts SEO Year-End & Capital Campaigns

Wrapping Up – Opportunities Assessment

To maximize your fundraising ecosystem, many areas to assess, but start with these 3 main pillars:

- Branding and storytelling begins with your website and everything counts
- Remove barriers to give by implementing the right technology
- Maximize data to fuel quality engagement for long-term success

**As a nonprofit serving other nonprofits,
Give Back Nation is here to help.**



Questions?



This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.



Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

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GiveBackNation.com